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## *Memorandum*

TO: TransLink® Management Group

DATE: April 21, 2010

FR: Jacob Avidon

RE: Update on Transition from TransLink® to Clipper<sup>SM</sup>

In December 2009, MTC's Operations Committee and the TransLink® Management Group (TMG) approved staff's recommendation to change the name of the TransLink® fare payment system to Clipper<sup>SM</sup>. The new name is expected to be more appealing to Bay Area transit riders, unique to the region ("TransLink" has been adopted by several other transportation services around the world), and evocative of the region's transportation history. Renaming the program also provides an opportunity to re-launch the program to the public. The program is at a unique juncture, where changing the program name leverages several initiatives already in progress or in the final planning stages:

- The transition of transit operator passes and tickets to smart card-only availability, as required by MTC Resolution 3866, which will dramatically increase the visibility of the system;
- Replenishment of the card inventory (MTC will receive about 1 million cards over the next three months);
- Achievement of the Revenue Ready milestone for the system's implementation on SamTrans and VTA; and
- A previously-planned customer education program that will introduce the payment system to customers of AC Transit, BART, Caltrain, Golden Gate Transit bus and ferry, and SFMTA.

To support the transition to Clipper<sup>SM</sup>, MTC and the transit operators have developed a customer education program to introduce Clipper<sup>SM</sup> first to existing TransLink® customers, who are already familiar with the payment system, and then to transit riders who have not yet adopted the smart card. The effort will occur in two phases: the first phase targeting current TransLink® customers will take about two months; and the second phase will begin on June 16, 2010 when the program becomes fully re-branded as Clipper<sup>SM</sup>.

The objective of the program is to educate transit customers, especially those affected by the phase-out of existing passes and tickets, about what Clipper<sup>SM</sup> is, how it works, where to get a card, and where to add value. Unfortunately, these basic details of the program are not always easy to communicate to customers; for example, research conducted by MTC found that many customers struggled to understand how to add the equivalent of a transit agency monthly pass to the card, which is why the education program will focus on basic details about the system and

how it works. With input from the TransLink<sup>®</sup> Marketing and Distribution Subcommittee, MTC is planning the following approaches for the second phase of the customer education program:

- Beginning in July or August 2010, simultaneously launch the education program across five agencies – AC Transit, BART, Caltrain, Golden Gate Transit and Ferry and SFMTA – in order to make the education program as visible as possible;
- Continue the program for 2-3 months unless extended by in-kind space provided by transit operators;
- Use in-station and on-board signs to provide basic information – what Clipper<sup>SM</sup> is, how it works, where to get a card, and where to add value – to customers during their transit rides;
- Implement a limited television and radio program to offer additional channels for disseminating information to customers;
- For the in-station and on-board signs, tailor the education program to specific operators, e.g. provide different instructions for how to use Clipper<sup>SM</sup> on BART than on AC Transit;
- Deploy outreach teams to transit stations and on-board busy transit lines to answer questions and distribute cards; and
- As operators phase-out their existing passes and tickets, operators will inform their customers about the policy changes using communications that are separate from the basic information about Clipper<sup>SM</sup>.

In preparation for both the transition to Clipper<sup>SM</sup> and the introduction of the customer education program, MTC is working with the Contractor and the operators to identify and manage operational risks. The following table identifies some of the key risks and mitigation strategies:

<b>Risk</b>	<b>Mitigation Strategy</b>
Device performance	Monthly inspections of on-board equipment (MTC will provide results in the monthly Program Management Report)
Customer service center capacity	Monitor Contractor's continued achievement of all key performance indicators (information already shown in Program Management Report)
Preparation of front-line personnel (bus drivers, station agents, customer service personnel, retail staff)	Dissemination of Clipper <sup>SM</sup> -related information (posters, bulletins, etc.) and additional training
Deployment of software to equipment and BART faregates to enable acceptance of new card type	Contractor is scheduled to deploy all software to equipment in late April and May; Contractor is working with BART concerning deployment of software to BART faregates